

***Exercise Guide for
PA410
Advanced Create and Maintain
Employee Data***



Table of Contents

<i>1.1 – Exercise: Non-Beacon to Beacon - Lateral</i>	<i>3</i>
<i>1.2 - Exercise: Transfer Within Agency – Lateral.....</i>	<i>15</i>
<i>1.3 - Exercise: Transfer Agency to Agency – Promotion</i>	<i>22</i>
<i>2.1 - Exercise: Leave of Absence – Medical</i>	<i>27</i>
<i>2.2 - Exercise: Leave of Absence – Workers Compensation.....</i>	<i>32</i>
<i>2.3 – Exercise: Leave of Absence – Military.....</i>	<i>40</i>
<i>2.4 - Exercise: Reinstatement</i>	<i>48</i>
<i>3.1 – Work Against</i>	<i>50</i>
<i>Discussion: Reallocation</i>	<i>53</i>

1.1 – Exercise: Non-Beacon to Beacon - Lateral

Scenario

Mary Poppins, an Office Assistant IV at UNC-CH, has accepted an Office Assistant IV position at the Cultural Resources Archives and History office for a salary of \$25,750. Her current salary is \$25,750 and she is a permanent, subject to FLSA OT employee. She had 110 months of creditable service at UNC-CH. Mary was given a State ID and two office keys.


Instructions

There are four parts to this Exercise:

- I Initiate Workflow (WF)
 - II Act as Division/Agency (D/A) Approver and approve PCR
 - III Act as Funding Approver and approve PCR
 - IV Process Approved PCR from the Initiator's Inbox
-
- ☒ It is important that you complete all of the exercises in their entirety because some subsequent exercises depend upon the data that you entered in previous exercises.
 - ☒ The Non-Beacon to Beacon exercise has 4 parts as outlined above in order to give you an opportunity to see 2 levels of approval (Agency and Funding). In subsequent exercises, your instructor may have you act as both the Agency Approver and Funding Approver or may have the course navigator perform one or both of those roles.
 - ☒ The online Business Process Procedure (BPP) is your step-by-step process. The Exercise Guide is **not** intended to be a step-by-step guide but merely contains the data you will use. There are steps included in the first couple of exercises in the Exercise Guide; after that, you are instructed to use what you have learned up to that point to perform the subsequent exercises.

Part I – Initiate Workflow (WF) as Initiator


Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. Log onto SAP using the **Initiator** user ID and password.
2. Assume you have already run the *Verify Employment* Report and did not find the employee in the system; assume you also used PPOSE and verified that the position is vacant.
3. On the Easy Access screen, type **ZPAA076** in the Command field.
4. Click . The Employee Action Request screen is displayed.

5. Enter the following data:

Field	Value
Last 4 digits (SSN)	Use any 4 digits of your choosing (if you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers until it is accepted). Important! Write down the numbers you used because you will need them again: _____ You only have to enter the last 4 SSN when you are processing a New Hire or Non-Beacon to Beacon. For all other Actions, you do not enter the last 4 SSN.
Employee Name	Maryxx Poppinsxx (where xx represents your initials). You only enter your initials in class, not in your work environment.
Effective on	Today's date
Action Type	Non-Beacon to Beacon
Reason	Transfer Lateral








6. Click Enter .

7. Click Create . The second screen of the Employee Action Request screen is displayed.


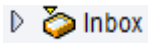
8. Enter the following data:






Field	Value
EE Position	Use the Data Sheet Office Assistant IV position number assigned to your student number. Press Enter.
EE Group/Subgroup	Observe that the Employee Group and Employee Subgroup fields are now populated. When the Position number is entered, BEACON SAP defaults the Employee Subgroup to FT Perm (S or N-FLSAOT depending on the position). You will change as applicable for the Action you are processing. For this exercise, leave the default.
Annual Salary	\$25,750

NOTE: Observe there are two fields that will not be used now, but will be used in later Actions; Work Against and Last Date Worked.





9. Click Enter .
10. Click Save . The Information pop-up is displayed with the assigned PCR number.
11. Write the PCR number on the employee paperwork (in class, use the Data Sheet).
12. Click  to close the pop-up.
13. Click Services for Object . **NOTE:** This button is not available until you save the PCR. The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon. Private notes can only be seen by the Initiator.
14. Select Create > Create Note.
15. Enter a note title.
16. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action. Private notes can only be seen by the person who created them.
17. Click  to close the notes. If applicable, close the notes icon menu.
18. Click . The Information pop-up is displayed indicating that the PCR has been submitted.
19. Click  to close the Information pop-up. You are returned to the Employee Action Request (first screen).
20. To move from the Initiator role do one of the following :
 - Minimize the Initiator logon and keep it on your desk top
 - Log off: Click the X in upper right and click Yes at the popup. Click the Log Off link on the portal screen and Yes when asked if you are sure.






Part II – Act as Agency Approver and Approver PCR

1. Log onto SAP using the **Approver** user ID and password.
2. From the Easy Access screen, click SAP Business Workplace .
3. Click the node beside Inbox  to expand it.
4. Double-click Workflow. The PCRs that have been sent to you for approval are listed in the right column.
5. Select the PCR you want to review.
6. In the bottom section of the screen scroll down and click the link for the PA PCRxxxxxxxxxx (PCR number) that you want to review. The PCR Employee Action Request screen is displayed.



7. Click Services for Object  to review any notes that were entered by the Initiator.
NOTE: The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
8. Select Attachment List. The Services: Attachment list pop-up is displayed.
9. Highlight the line item for the note and select Display  (or double-click). The Display note pop-up is shown with the note title and note information.
10. Click  to close the Display note pop-up.
11. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
12. Click the back button  to return to the Workflow screen.
13. With the applicable PCR still highlighted, click Execute  (or double-click the PCR line item).
14. Observe that you can approve, cancel the PCR and keep it in your files, reject it and send it back to the Initiator, or send it to OSP. You should be aware that sending it to OSP is not an automatic step in the process. At the D/A level, the Approver will determine if the PCR needs OSP approval and make that selection here as applicable.
15. Click Approve Change.
16. Log off as the Agency Approver: click the X in upper right and click Yes at the popup. Click the Log Off link on the portal screen and Yes when asked if you are sure.


Part III – Act as Funding Approver and Approve PCR

1. Log onto SAP using the **Funding Approver** user ID and password.
2. From the Easy Access screen, click SAP Business Workplace .
3. Click the node beside Inbox  to expand it.
4. Double-click Workflow. The PCRs that have been sent to you for approval are listed in the right column.
5. Select the PCR you want to review.
6. In the bottom section of the screen scroll down and click the link for the PA PCRxxxxxxxxxxxxx (PCR number) that you want to review. The PCR Employee Action Request screen is displayed.
7. Click Services for Object  to review any notes that were entered by the Initiator.
NOTE: The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
8. Select Attachment List. The Services: Attachment list pop-up is displayed.
9. Highlight the line item for the note, and select Display  (or double-click). The Display note pop-up is displayed with the note title and note information.

10. Click  to close the Display note pop-up.
11. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
12. Click the Back button  to return to the Workflow screen.
13. With the applicable PCR still highlighted, click Execute  (or double-click the PCR line item). The Employee Action Request – Funding screen is displayed.
14. Click the General tab and review for accuracy.
15. Click the Cost tab. For this exercise you will only review the data that the Funding Approver could enter on the Cost tab, but you will not actually enter data.
16. Click Update 1018 . The Create Cost Distribution screen is displayed. The Create Cost Distribution screen is where the Funding Approver would enter data in the applicable columns to change the funding source or split funding, etc.
17. Press Enter. The Budget Distribution pop-up is displayed. This screen allows the Funding Approver to enter the amount budgeted for the position and the reason why the funding was changed.
18. Click the down arrow in the Action/Reason Code field and view the options for funding changes.
19. Click X to close the list of reasons.
20. Click  to close the Budget Distribution pop-up.
21. Click the green check to close the Budget Distribution pop-up. Click Yes if you receive a warning message that indicates you have not entered data. The Cost tab is displayed.
22. Click the Back button to return to the Business Workplace.
23. The Decision Step in Workflow is displayed. Observe that the Funding Approver can approve, cancel and keep the PCR in his or her files, or reject it and send it back to the Initiator.
24. Click Approve Change.
25. Log off as the Funding Approver: click the X in upper right and click Yes at the popup. Click the Log Off link on the portal screen and Yes when asked if you are sure

Part IV – Process Approved PCR from Initiator Inbox



1. Log onto SAP using the **Initiator** user ID and password, or maximize as applicable.
2. From the Easy Access screen, click SAP Business Workplace .
3. Click the node beside Inbox  to expand it.
4. Double-click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
5. Select the PCR you want to process.

6. Click Execute  (or double-click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Hiring Action screen).


Caution! BEACON SAP Actions are designed to be completed from beginning to end; it is not appropriate for one person in the Agency to enter some of the infotypes and someone else to go in and use PA30 to complete the infotypes individually. The Action has dynamic processes that take place behind the scenes which affect time and payroll. Completing the Action in a piece-meal manner does not allow these dynamic processes to take place which causes errors in the employee's time and payroll processes at a later date.

7. On the Hiring Action screen, enter the following data:

Field	Value
SSN	On the Hiring Action screen you must enter the complete social security number (on WF, you only entered the last 4). For training use any set of numbers of your choosing. Caution! Be sure the last 4 are the same as the ones you entered on WF. If you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers (except the last 4) until it is accepted.
DOB	04/01/1975
Gender	Female

8. Click Enter  and Execute . The Personnel Actions screen is displayed with an assigned personnel number.
9. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Today's date (the date on this screen should always be the same date as you entered on the WF).
Action Type	Non-Beacon to Beacon

10. Click Enter .
11. Click Execute .

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

12. Complete the following fields:

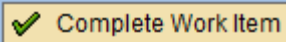
Infotype/Field	Value
Actions (0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF
EE Group/ Subgroup	Observe the field defaulted from WF If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Enter and Save.
Organizational Assignment (0001)	Enter and Save
Delimit vacancy	Yes
Date Specifications	Review for accuracy Enter and Save
Personal Data (0002)	
Title	Select from drop-down list
Marital status	Single
Gender	Female
Dependents	Leave blank (this field is not used during the Action) Enter and Save
Addresses (0006)	
Permanent address	67 Grand Ave Raleigh NC 27604 Wake County
Telephone	919-244-8754 Enter and Save
Tax screens (0207, 0208, 0209)	These all default from the previous information you entered. Review for accuracy, Enter and Save.
Withholding Info W4/W5 US- Federal Filing Status	Single (01)

Infotype/Field	Value
Allowances	1 Enter and Save
Withholding Info W4/W5 US – State Filing Status	Single (01)
State Allowances	1 Enter and Save
Addresses (0006)	
Emergency	Joe Cain 12 Elm St Raleigh NC 27604 Telephone: 919-818-4545 Enter and Save
Mailing address/phone	Use Next Record to skip
Monitoring of Tasks (0019)	The Monitoring of Tasks infotype is used to remind you of a task on which you need to follow up concerning the employee (such as a tickler file). For this Exercise, click Next Record to skip.
I-9 Status (0094)	
Residence status	Click the drop-down and select Citizen. Be aware that if an employee is not a citizen, you would make a different choice in the drop-down, and a second infotype (0048 Residence Status) would display. See the Student Guide for details concerning how to process infotype 0048. NOTE: The BEACON SAP entry for non-Citizen employees does not replace Windstar—you must still enter non-Citizen employees into the Windstar system which is the official system of record for non-citizen employees.
ID type	Click the drop-down and select U. S. Drivers License w/photo. Observe there are additional options in the Employment Verification section of the screen.
Issuing Authority	North Carolina
ID #	NC7856524

Infotype/Field	Value
Dates	<p>Issued 10/01/2006 Expires 10/01/2010</p> <p>Enter and Save</p>
Communication (0105)	<p>919-259-4574. This infotype is for the entry of the employee's office telephone.</p> <p>Enter and Save</p> <p>You may receive a warning that the ID number is already in use. Enter to bypass the warning.</p>
Planned Working Time (0007)	<p>It is critical that you review this infotype. The planned working time defaults based on the employee's organizational structure—company code, personnel area and subarea, cost center, business area, fund and functional area.</p> <p>For this exercise, accept the default. Observe that when you press Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field.</p> <p>Enter and Save</p>
Basic Pay (0008)	<p>Reason: Non-Beacon to Beacon</p> <p>It is important that you always enter the Reason field and that you use the same reason as the Action type.</p> <p>Observe that the salary defaulted from WF. Observe also that the value is USD which has automatically populated. If the employee was assigned to a DOT position, BEACON SAP would automatically change the field to USDN. All permanent DOT positions require 5 decimals on the Basic Pay infotype (0008). If the DOT employee is a temporary employee, the field will remain as USD because 5 decimals are not required for DOT temporary employees.</p> <p>Enter and Save</p>
Possible subsequent activities	<ul style="list-style-type: none"> • Click the green check to get to the enrollment screen • Double-click the "automatic offer" option in order for TSERS to display • Click the Enroll button • Click Enroll again • Click Continue • Click the Back button (top of screen) • Click the red X to return to the data entry screen

Infotype/Field	Value
Bank Details	<p>The completion of the Bank Details infotype (0009) <u>must</u> be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, it is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing.</p> <p>In order to change the field to “check” you must fill out the proper forms and receive higher level approval.</p>
Bank routing	021312971 (Capital Bank and Trust)
Bank account number	234987656
Bank Control key	01 (01 is checking; 02 is savings) Enter and Save
Additional Personal Data (0077)	
Ethnic Origin	Use your own
Military status	Leave blank
Veteran status	Non-veteran
Disability status	None/prefer not to report Enter and Save
Subtype for Infotype “Education”	Select High School Click the green check to close.
Education (0022)	
Start and to	09/01/1992 - 05/30/1995 NOTE: You are entering the dates the employee indicated they attended the institution.
Institution location	Central High
Verified	High School 02. NOTE: you would only choose 02 if your Agency does not require verification of high school education; otherwise you would use the pending code. Enter and Save

Infotype/Field	Value
Monitoring of Tasks (0019)	Use applicable icon to skip infotype. NOTE: You would skip this infotype if your Agency does not require verification of high school education; otherwise you would enter the applicable date on this infotype indicating when you expected to have the verification completed.
Subtypes for infotype Certification and Licensing	Click X to close pop-up window. This infotype is used when the position requires a specific certificate or license.
Objects on loan (0040)	State ID Number/unit: 1/pieces #99919 NOTE: On the Action, you are to only enter one item on loan. If the employee receives more than one item--like in this case key # B05 and key #A12-- you will use PA30 to add the additional items). Enter and Save

13. Click the Back button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).
14. The pop-up is displayed indicating that the item must be explicitly completed. Click Complete Work Item . **NOTE:** It is critical that you complete this last step. You may receive a Decision in Work Item screen. If you do, select PA Action Completed.

PA30	In this exercise, the employee has 110 months of creditable service from UNC-CH. Enter the service on the employee's record.
Infotype: Time Specifications/Employment Period	Before you enter data on infotype 0552, you should always contact BEST and get assistance to ensure that you are calculating the time correctly and entering it as applicable. Infotype: 0552 Subtype: 0267 Press Enter Click Create
Start/to	10/10/1998 – 12/19/2007

Comments	<p>In the Comments field enter: “The employee earned creditable service at UNC-CH”.</p> <p>NOTE: When you enter and save, the “months” field should populate 110 months.</p> <p>In this case, you only had to use one PA30, 552 to enter the creditable time. But if the employee had worked and earned creditable time at more than one University, you would need to enter a PA30, 553 to enter the creditable time for each location.</p>
Objects on Loan (0040)	<p>Office Key</p> <p># B05</p>
Objects on Loan (0040)	<p>Office Key</p> <p>#A12</p> <p>After you enter the second key, remove subtype from the field; use Overview to see all of the items on loan (you should see three items).</p>

Questions

Answer the following questions.

Question 1

When is the Non-Beacon to Beacon Action appropriate?

A.

Question 2

When is the Reinstatement Action appropriate?

A.



1.2 - Exercise: Transfer Within Agency – Lateral

Scenario

Helen Stephens is an Office Assistant IV at the CR CDS MOA Deputy Director CFO organizational unit. She is making a lateral transfer to the CR CDS MOA Educational Service org unit. She is currently a full-time, subject FLSA employee with the same salary. The effective date is today. At the new Agency, she receives a cell phone.

Overview

Whether you are the Leaving Agency or the Receiving Agency, you should contact each other to discuss the transfer before processing in BEACON. The leaving Agency takes no action in BEACON (except delimit items the employee returned).

If your security access permits, you can see some information on employees from other Agencies. Run the *Verify Employment* BI Report located in the Cross Agency Verification folder.

If you transfer an employee from one *employee type* to a different *employee type*, you must change the Employee Subgroup. If the employee is going from one *payroll type* to a different *payroll type*, you will only initiate the PCR and when it is approved, you will contact BEST.

Two ways to process a Transfer in BEACON

There is only one Transfer Action in BEACON; however, you may process transfers in one of two ways, depending upon your security access.

If you have security access for:

1. both the *Leaving* Agency and the *Receiving* Agency, BEACON SAP allows you to complete all of the infotypes during the Transfer Action.
2. only the Receiving Agency, BEACON SAP allows you to partially complete the Action. In the latter case, you will use PA30 to complete the infotypes.


In this exercise you have authority for both the Leaving and the Receiving Agency.

There are three parts to this Exercise; however you will only be responsible for Parts I and III unless otherwise directed by your Instructor:



- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Part I – Initiate Workflow (WF) as Initiator

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.






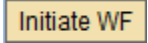

1. Verify that you are logged on as the **Initiator**.
2. Assume you have already run the *Verify Employment Report* and found the employee in the Leaving Agency; assume you also used PPOSE and verified that the position is vacant.
3. On the Easy Access screen, type **ZPAA076** in the Command field.
4. Click . The Employee Action Request screen is displayed.
5. Enter the following data:

Field	Value
Personnel number	Use the Data Sheet Helen Stephens personnel number that is assigned to your student number.
Effective on	Today's date
Action Type	Transfer
Reason	Within Agency - lateral

6. Click Enter .
7. Click Create . The second screen of the Employee Action Request screen is displayed.
8. Enter the following data:

Field	Value
EE Position	Use the Data Sheet Office Administrative IV position number that is assigned to your student number. Enter
EE Group/Subgroup	The Employee Group and Employee Subgroup fields are now populated. When the Position number is entered, the Employee Subgroup defaults to FT Perm (S or N FLSAOT depending upon the position). You should change as applicable for the Action. For this Exercise, save the default.
Annual Salary	Same as previous salary (hint: look in Current column)

NOTE: Observe there are two fields that will not be used now, but will be used in later Actions: Work Against and Last Date Worked.

9. Click Enter .
10. Click Save . The Information pop-up is displayed with the assigned PCR number.
11. Write the PCR number on the employee paperwork (in class, use your Data Sheet).
12. Click  to close the pop-up.
13. Click Services for Object . **NOTE:** The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
14. Select Create > Create Note.
15. Enter a note title.
16. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.
17. Click  to close the notes. If applicable, close the notes icon menu.
18. Click . The Information pop-up is displayed indicating that the PCR has been submitted.
19. Click  to close the Information pop-up. You are returned to the Employee Action Request (first screen).
20. You must now wait until the PCR has been approved and returned to your Inbox.




Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Financial

Part III – Process Approved PCR from Initiator’s Inbox

NOTE: In this exercise, you are processing an employee who already has an existing record; therefore, each infotype will have a warning message that the previous record will be delimited. Enter to bypass the warning message. Remember to save infotypes.

1. From the Easy Access screen, click SAP Business Workplace .
2. Click the node beside Inbox  to expand it.
3. Double-click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
4. Select the PCR you want to process.
5. Click Execute  (or double-click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is Personnel Actions)

6. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Today's date (should always match the date you entered on WF).
Action Type	Transfer

7. Click Enter .

8. Click Execute .

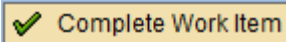
NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

9. Complete the following fields:

Infotype/Field	Value
Actions (0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF
EE Group/Subgroup	Observe the field defaulted from WF If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Enter and Save.
Organizational Assignment (0001)	Enter and Save
Create vacancy	Yes
Delimit vacancy	Yes
Date Specifications	Review for accuracy Enter and Save

Infotype/Field	Value
Planned Working Time (0007)	<p>It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure—company code, personnel area and subarea, cost center, business area, fund and functional area.</p> <p>For this exercise, accept the default. Observe that when you press Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field.</p> <p>Enter and Save</p>
Possible subsequent activities	<p>Use the X to cancel. Since this is a “with-in” Agency transfer, the employee is already enrolled in the applicable retirement from the Leaving Agency.</p>
Basic Pay (0008)	<p>Reason: Transfer</p> <p>Observe that Salary populated from WF.</p> <p>Enter and Save</p>
Objects on loan (0040)	<p>If the employee returned the items and the Leaving Agency did not delimit the objects, the infotype will display with the item and the end date of 12/31/9999. In that case, you can either enter your item and do a PA30 to delimit the Leaving Agency's item, or alternatively, you can delimit the Leaving Agency's item in the Action and do a PA30 to add your item. It doesn't matter as long as you remember to do both if needed.</p> <p>In this case, assume that the employee did not return the item on loan to the previous Agency. However, you issued the employee a new State ID (#99919). Highlight the number in the Loan object no. field and enter the new number.</p> <p>State ID</p> <p>Number/unit: 1.pieces</p> <p>#99919</p> <p>NOTE: On the Action, you are to only enter one item on loan. In this case, you will need to create a PA30 to enter the key that the employee received.</p>

- Click the Back button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).

11. The pop-up is displayed indicating that the item must be explicitly completed. Click Complete Work Item . **NOTE:** It is critical that you complete this last step.

<p>PA30 Infotype 0040</p>	<p>Before you enter the additional item, use the Overview function to view the current record. You should see:</p> <ul style="list-style-type: none"> • One State ID from the Leaving Agency from the date of hire through 12/31/9999 (#55514xx—where xx is the item number for the employee assigned to you). • A second State ID that you entered from the date of the Transfer through 12/31/9999 (#99919) <p>Enter the key (#45) that the employee received.</p>
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<p>PA30</p>	<p>A few minutes ago the Leaving Agency informed you that the employee returned the ID badge they had issued.</p> <ul style="list-style-type: none"> • Access PA30 and enter the personnel number if needed. • Enter 0040 and choose the applicable subtype for State ID. • Click the Delimit button. • Accept the delimit date in the pop-up. • Click the green check to close the delimit date notice. • Select the line item that contains ID#55514xx. • Click the Delimit button. • Use the Overview function to see the items on loan; observe that the Leaving Agency's ID now has an end date.
--------------------	---

Questions

Answer the following questions.

Question 1

What is the name of the report that you should view before you transfer a BEACON employee into your BEACON Agency?

A.

.....



Course Title: *Advanced Create and Maintain
Employee Data*

Functional Area: *Human Resources*

Sub Area: *Personnel Administration*

Question 2

True or False: You can use the Transfer Action only when you are transferring an employee into your Agency from another BEACON Agency; however, you cannot use this Action to move an employee within your own Agency.

A.

Question 3

True or False: A reassignment cannot be included with a Transfer Action.

A.

This exercise is complete.

1.3 - Exercise: Transfer Agency to Agency – Promotion

Scenario

Marsha Sanders is being promoted from Facility Survey Consultant I at DHHS to a Facility Planner III at the CR CDS Capital Projects Unit Org unit. She returned the objects on loan to the Leaving Agency, but the HR Master Data Maintainer there failed to delimit the infotype. In addition, your agency issued Marsha a cell phone.

Be sure to read the information in the previous exercise about processing Transfer Actions.


In this exercise, you only have authority for the Receiving Agency and no authority for the Leaving Agency. Therefore, you will only partially complete the infotypes in the Transfer Action. You will finish the infotypes using PA30.

There are four parts to this Exercise; however you will only be responsible for Parts I, III and IV unless otherwise directed by your Instructor:

- I Initiate Workflow (WF)
- II Approve PCR (your instructor will let you know if you are to do this step)
- III Process Approved PCR
- IV PA30 to complete the infotypes


Part I – Initiate Workflow (WF) as Initiator

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. Assume you have already run the *Verify Employment Report* and found the employee in the Leaving Agency; assume you also used PPOSE and verified that the position is vacant.
2. On the Easy Access screen, type **ZPAA076** in the Command field.
3. Click . The Employee Action Request screen is displayed.
4. Enter the following data:






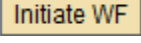

Field	Value
Personnel number	Use the Data Sheet Marsha Sanders personnel number that is assigned to your student number.
Effective on	Today's date
Action Type	Transfer
Reason	Agency to Agency - Promotion

5. Click Enter .

6. Click Create . The second screen of the Employee Action Request screen is displayed.
7. Enter the following data:

Field	Value
EE Position	Use the Data Sheet Educational Development Consultant position number in that is assigned to your student number. Press Enter. NOTE: When the Position number is entered, the Employee Subgroup defaults to FT Perm. Change as needed for the Action. Save to accept the default.
Annual Salary	\$42,500

NOTE: Observe there are two fields that will not be used now, but will be used in later Actions: Work Against and Last Date Worked.




8. Click Enter .
9. Click Save . The Information pop-up is displayed with the assigned PCR number.
10. Write the PCR number on your new hire paperwork (in class, use your Data Sheet).
11. Click  to close the pop-up.
12. Click Services for Object . **NOTE:** The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
13. Select Create > Create Note.
14. Enter a note title.
15. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.
16. Click the green check  to close the notes. If applicable, close the notes icon menu.
17. Click . The Information pop-up is displayed indicating that the PCR has been submitted.
18. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).
19. You must now wait until the PCR has been approved and returned to your Inbox.

Part II - Instructor or Navigator will Approve the PCR



Note to instructor and navigator: There are two approval levels:

- Agency
- Financial


Part III – Process Approved PCR as Initiator


1. From the Easy Access screen, click SAP Business Workplace .
2. Click the node beside Inbox  Inbox to expand it.
3. Double-click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
4. Select the PCR you want to process.
5. Click Execute  (or double-click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action, (in this case it is Personnel Actions).
6. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Today's date
Action Type	Select Transfer

7. Click Enter .
8. Click Execute .
9. Complete the following fields:

Infotype/Field	Value
Actions (0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF
EE Group/Subgroup	Observe the field defaulted from WF If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Enter and Save.
Organizational Assignment (0001)	Enter and Save

Infotype/Field	Value
Create vacancy	Yes
Delimit vacancy	Yes  STOP!!!!
<p>NOTE: In your work environment, as soon as you click the second “yes”, BEACON SAP automatically takes you out of the Action and returns you to the Personnel Actions screen because you do not have the authority to create a vacancy for the leaving Agency.</p> <p>In Training, you must manually back out of the Action.</p> <p>A. Click the Back button on the Date Specifications infotype to exit the Action and return to the Personnel Actions screen (you perform this step only in training).</p> <p>B. Click Yes at the message indicating data will be lost (you perform this step only in training).</p> <p>The remaining steps are done the same in training as in your work environment.</p>	

10. Click the Back button at the Personnel Actions screen.
11. The pop-up is displayed indicating that the item must be explicitly completed. Click Complete Work Item  Complete Work Item. **NOTE:** It is understood that technically you have not completed the work item at this step; however, you are to still select it, and then immediately process a PA30 to complete the item.

Part IV – Process PA30

1. From the Easy Access screen, enter PA30 in the Command field.
2. If necessary, enter the Personnel number.
3. Select the **Actions** infotype.
4. Select the **All** time period
5. Click the **Overview** button.
6. Select the **Transfer** action row on the List Actions infotype (0000).
7. Click the **Copy** icon. The Copy Actions infotype (0000) is displayed.
8. Select the **Execute Infogroup** button on the Change Actions infotype. A message at the bottom indicates the record is stored only in additional infotypes.
9. Click **Save**.
10. Click the check to bypass the message that the record will not be saved. The Organizational Assignment infotype (0001) is displayed.
11. Click **Save**. Enter to get past the message that indicates the entry deletes a record. The Copy Date Specifications infotype is displayed.

12. Beginning with the Copy Date Specifications infotype, either enter data and save, or just save the infotypes as applicable:
 - 0041 (Agency date should have pre-populated as the transfer date)
 - 0007 Planned Working time – change as necessary
 - 0008 (**Caution!** The reason on 0008 is **always** the same type as the Action name (in this case the Action was **Transfer** even though a promotion was involved).
 - 0040 Enter the cell phone: 919-584-1212
13. When you have completed the last infotype in the series, BEACON automatically returns you to the List Actions infotype screen.
14. Click the green arrow back to the Maintain HR Master Data screen.
15. Use the Overview function to see both items on loan. You should see the item from the Leaving Agency is still active and the cell phone has been added with an end date of 12/31/9999.
16. Verify that the Transfer Work Item is complete (assuming you clicked the Complete Work Item in a previous step as instructed) by checking the Outbox in either the Started Workflows as well as the Workflows Completed by Me folders. In either folder, use the Workflow tracker to see that the last item on the list shows that it was processed by you.

2.1 - Exercise: Leave of Absence – Medical

Scenario


Janet Thomas is a permanent employee who works at the Department of Commerce. She has the following leave balances: 240 sick and 240 vacation. Effective today, she is going out on FMLA due to her husband's (Bill) serious medical condition. She expects to be out for a total of 12 weeks. Janet has not indicated that she wishes to use any of her leave for this LOA.

There are three parts to this Exercise; however you will only be responsible for Parts I and III unless otherwise directed by your Instructor:



- I Initiate Workflow (WF)
- II Approve PCR (LOA does not go to Funding Approver)
- III Process Approved PCR

Part I – Initiate Workflow as Initiator








Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

- On the Easy Access screen, type **ZPAA076** in the Command field.
- Click . The Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Personnel number	Use the Data Sheet Janet Thomas personnel number that is assigned to your student number.
Effective on	Today's date
Action Type	Leave of Absence
Reason	FMLA

- Click Enter .
- Click Create . The second screen of the Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Annual Salary	Same as her current salary (hint: look in Current column)

7. Click Enter .
8. Click Save . The Information pop-up is displayed with the assigned PCR number.
9. Write the PCR number on your new hire paperwork (in class, use your Exercise Guide).
10. Click  to close the pop-up.
11. Click Services for Object . The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
12. Select Create > Create Note.
13. Enter a note title.
14. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.
15. Click the green check  to close the notes. If applicable, close the notes icon menu.
16. Click . The Information pop-up is displayed indicating that the PCR has been submitted.
17. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).
18. You must now wait until the PCR has been approved and is returned to your Inbox.

Part II - Instructor or Navigator will Approve the PCR



Note to instructor and navigator: There is one approval level:


- Agency

Part III – Process Approved PCR as Initiator



NOTE: In this exercise, you are processing an employee who already has an existing record; therefore, each infotype will have a warning message that the previous record will be delimited. Enter to bypass the warning message.

Also, you are not given directions to enter and save on each infotype; use the knowledge you have gained to make the correct choices.

1. From the Easy Access screen, click SAP Business Workplace .
2. Click the node beside Inbox  to expand it.
3. Double-click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
4. Select the PCR you want to process.

5. Click Execute  (or double-click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is Personnel Actions).
6. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Today's date (should always be the same that you entered on WF).
Action Type	Leave of Absence

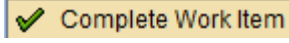
7. Click Enter .
8. Click Execute .
9. Complete the following fields:

Infotype/Field	Value
Actions (0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF
E Group/Subgroup	Observe the field defaulted from WF
Organizational Assignment (0001)	
Monitoring of Tasks	<p>To view a list of your tasks, you must run the <i>Date Monitoring Report</i> (transaction S_PHO_48000450).</p> <p>Caution! When you place an employee on LOA, it is important that you enter a monitoring of task for estimated return date. The 0019 infotype is connected to the Benefits Confirmation form that is sent to employees. If you do not enter 0019 for estimated return date, the benefits coordinator will not be able to produce the Benefits Confirmation forms.</p>
Task Type	Estimated Return Date
Date of Task	Use the calendar icon to select the date when the 12 weeks will end.
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.
Comments	The employee is expected to return to work at the end of 12 weeks.

Infotype/Field	Value
Delimit Objects on loan (0040)	Click Next Record icon In your work environment, follow your Agency's policy regarding whether or not employees return items while out on leave. If the employees should return the items, you would then delimit the infotype.
Create Substitutions (2003)	From: The date of the Action To: 12/31/9999 Substitution type: LOA FMLA Daily Work Schedule: Leave blank Work schedule rule: D01N08GN (for this scenario). You will always enter either a 40-day work schedule for a full-time employee, or a 20-day work schedule for a part-time employee. NOTE: If you enter the Holiday Calendar ID before you enter the work schedule rule, the list of rules will be limited to only those that apply to the Holiday Calendar; otherwise, all of the work rules display. Holiday Calendar ID: Will automatically populate when you enter the Work schedule rule and press Enter.
Subtypes for infotype Absences pop-up	X close out for this scenario because the employee has not elected to use any leave for this LOA.
Subtypes for infotype Time Quota Pop-up	X close out for this scenario because the employee has not elected receive a lump sum payout.

10. Click the Back button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).

11. The pop-up is displayed indicating that the item must be explicitly completed. Click

Complete Work Item . **NOTE:** It is critical that you complete this last step.

Questions

Answer the following questions.

Question 1

When the employee returns to work from a leave of absence, what Action will you use to return the employee.

A.

Question 2

What purpose does the Monitoring of Tasks infotype serve?

A.

Question 3

Where do you receive a list of the tasks that you have entered in the Monitoring of Tasks Infotype ?

A.

Question 4

Assume that 12 weeks have passed and Janet indicates she needs an addition 3 weeks to care for her husband. She has the proper documentation. What steps do you take?

A.

This exercise is complete.

2.2 - Exercise: Leave of Absence – Workers Compensation

Scenario

Patricia Calloway is a permanent employee at Cultural Resources as an Archaeologist II with the following leave balances:

- 200 bonus
- 600 sick leave
- 80 vacation

Patricia was injured on the job while performing her duties and will probably be out of work for a few days. She wants to use 40 hours of vacation during her 7-day waiting period. She is entitled to and wants to receive 2 hours per week of supplemental pay during the 6-month period.

In order for Patricia to receive the supplemental pay, you should notify the Time Administrator so that the Time Administrator can go in each week for the six months that the employee is out on WC LOA and add 2 hours supplemental time each week.

There are two separate LOA Actions that must be completed for this scenario:

- A. – LOA #1 (7-day Waiting Period)
- B. – LOA #2 (with Supplement)


Each LOA Action has three parts; however you will only be responsible for Parts I and III unless otherwise directed by your Instructor:

- I Initiate Workflow (WF)
- II Approve PCR (LOA does not go to Funding Approver)
- III Process Approved PCR

A.—LOA #1 (7-day Waiting Period)

Part I (of A) – Initiate Workflow (WF) for 7-day Waiting Period as Initiator


Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, type **ZPAA076** in the Command field.
2. Click . The Employee Action Request screen is displayed.

3. Enter the following data:

Field	Value
Personnel number	Use the Data Sheet Patricia Calloway personnel number that is assigned to your student number.
Effective on	Tomorrow's date (employees get paid for the first date injured)
Action Type	Leave of Absence
Reason	WC 7-day waiting period


4. Click Enter .

5. Click Create . The second screen of the Employee Action Request screen is displayed.


6. Enter the following data:


Field	Value
Annual Salary	Same as her current salary (hint: look in Current column)

7. Click Enter .

8. Click Save . The Information pop-up is displayed with the assigned PCR number.

9. Write the PCR number on the employee paperwork (in class, use your Exercise Guide).


10. Click  to close the pop-up.

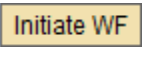
11. Click Services for Object . **NOTE:** The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.


12. Select Create > Create Note.

13. Enter a note title.

14. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.

15. Click the green check  to close the notes. If applicable, close the notes icon menu.

16. Click . The Information pop-up is displayed indicating that the PCR has been submitted.

17. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).




18. You must now wait until the PCR has been approved and is back in your Inbox.

Part II - Instructor or Navigator will Approve the PCR



Note to instructor and navigator: There is one approval level:

- Agency

Part III (of A) – Process Approved 7-day Waiting Period PCR as Initiator

1. From the Easy Access screen, click SAP Business Workplace .
2. Click the node beside Inbox  Inbox to expand it.
3. Double-click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
4. Select the PCR you want to process.
5. Click Execute  (or double-click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is Personnel Actions).
6. On the Personnel Actions screen, enter:


Infotype/Field	Value
From	Tomorrow's date
Action Type	Leave of Absence

7. Click Enter .
8. Click Execute .
9. Complete the following fields:

Infotype/Field	Value
Actions (0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF
E Group/Subgroup	Observe the field defaulted from WF
Organizational Assignment (0001)	
Monitoring of Tasks	To view a list of your tasks, you must run the <i>Date Monitoring Report</i> (transaction S_PHO_48000450).
Task Type	Workers Comp (7-day)

Infotype/Field	Value
Date of Task	Starting with tomorrow, count calendar days to the date that signifies the end of the 7-day waiting period.
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.
Comments	The 7-day waiting period ends. Change the record on the 8 th day to a new LOA and WC reason.
Delimit Objects on loan (0040)	Click Next Record icon In your work environment, follow your Agency's policy regarding whether or not employees should return items while out on leave. If the employees return the items, then you would delimit the infotype.
Substitutions (2003)	From: The date of the Action To: 12/31/9999 Substitution type: LOA WC Salary Continuation Daily Work Schedule: Leave blank Work schedule rule: D01N08GN (for this scenario). You will always enter either a 40-day work schedule for a full-time employee, or a 20-day work schedule for a part-time employee. NOTE: If you enter the Holiday Calendar ID before you enter the work schedule rule, the list of rules will be limited to only those that apply to the Holiday Calendar; otherwise, all of the work rules display. Holiday Calendar ID: Will automatically populate when you enter the Work schedule rule and press Enter.
Subtypes for infotypes "Absences"	Select Approved Leave
Absences (2001)	
Start and to dates	Start date: The first day of the waiting period To date: The date which is applicable for the number of leave hours being used. In this scenario, you need 5 Absence days to constitute the 40 hours. Enter and Save. Because you entered a substitution, you will receive a <i>Collision of Time</i> warning. Click the Red X . Now you can verify that the 40 hours accurately populated. If they did not accurately populate, change the <i>to</i> date accordingly.

Infotype/Field	Value
	<p>NOTE: if you fail to click the Red X at the <i>Collision of Time</i> infotypes pop-up, you will not be able to verify the hours.</p> <p>Click Save when the hours accurately calculate. The <i>Collision of Time</i> infotypes displays again. Click the Green Check.</p>
Subtypes for Time Quota Compensation Pop-up	Click Cancel.

10. Click the Back button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).
11. The pop-up is displayed indicating that the item must be explicitly completed. Click Complete Work Item  Complete Work Item. **NOTE:** It is critical that you complete this last step.

A .— LOA#1 (7-day Waiting Period) is complete.

B. -- LOA#2 – Create LOA WC Leave of Absence w/supplement

Scenario


Assume it is 7 days from the date Patricia Calloway was injured. According to your Date Monitoring report, the LOA for her WC first 7 days has ended. She indicates that she will be unable to work for six months. Place Patricia on LOA with the applicable reason. She is not using leave for any portion of this LOA.

There are three parts to this Exercise:

- I Initiate Workflow (WF)
- II Approve PCR (LOA does not go to Funding Approver)
- III Process Approved PCR

Part I (of B) – Initiate Workflow for WC with Supplement as Initiator

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

- On the Easy Access screen, type **ZPAA076** in the Command field.
- Click . The Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Personnel number	Use the same Data Sheet Patricia Calloway that you previously used
Effective on	Eight days after the start date of the 7-day waiting period (or, one day after the end date of the 7-day waiting period)
Action Type	Leave of Absence
Reason	WC LOA with supplement

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There is one approval level:

- Agency



Course Title: *Advanced Create and Maintain*

Employee Data

Functional Area: *Human Resources*

Sub Area: *Personnel Administration*

Part III (of B) – Process Approved WC with Supplement PCR as Initiator

NOTE: For Part III (of B), use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process the infotypes as applicable
 - Monitoring of Task – this time the date is at the end of six months
- Explicitly complete Workflow item

B. – LOA#2 WC w/supplement is complete.

LOA Overview for 7-day waiting period (non-consecutive days)

NOTE: You will not perform an exercise. This is presented for discussion purposes only.

The 7-day waiting period begins with the first day missed after the day of the accident (employees are paid in full the day of the accident regardless of what time they went out). The 7 days can be consecutive or non-consecutive. When an employee is out for the 7-day waiting period, you count calendar days (which includes the weekends). If the employee is out a partial day with lost wages, you count that as one whole day. You would not count doctor's appointments or treatments for the accident as absences because employees are paid as if they worked for reasonable time and travel to the doctor. The determining factor for counting is lost wages.

For the purposes of illustration, we will assume that an employee (Shirley James) gets hurt on Thursday, 1/10/08 at 9:00 a.m. She gets paid for that day. Shirley goes to the doctor and misses the rest of the day and does not come back on Friday. Shirley has chosen not to take leave for the 7-day waiting period. That makes 1/11/08 the first lost workday (initiate step 1 below). Shirley returns to work on Wednesday 1/16/08 (initiate step #2 - Reinstatement). When you enter the Reinstatement, the previous LOA Action is automatically delimited to 1/15. That means that the system has counted days 1/12, 1/13, 1/14, and 1/15 as lost days 2 through 5 (which includes Saturday, Sunday, Monday and Tuesday). She works through 1/21. She calls on Tuesday 1/22 to say she has a doctor's appointment. The doctor takes her off work duty indefinitely (initiate step #3). Benefits would begin on the 8th lost day which is 1/24 (initiate step #4). The system automatically calculates her last two lost days in the 7-day waiting period as 1/22 and 1/23.

1. LOA Action – WC 7-day waiting period, dated 1/11 until end of time
2. LOA Reinstatement—WC complete, dated 1/16 until end of time (which delimited #1 to 1/15)
3. LOA –WC 7-day waiting period, dated 1/22 until the end of time (which delimited #2 to 1/21)
4. LOA—either WC Leave of Absence or WC LOA w/supplement, dated 1/24 until the end of time which delimited #4 to 1/23)

2.3 – Exercise: Leave of Absence – Military

Scenario

Kumar Reinaldo is a permanent employee at Cultural Resources. He has the following leave balances:

- 150 hours of vacation
- 200 bonus
- 120 sick

He received active duty orders for 18 months beginning **May 5th**. He is not eligible for differential pay. He wants to use a combination of vacation and bonus (160 hours) leave prior to starting his 30 days Reserve Active Duty.

In this scenario, the Memorial holiday is included in the time frame for which he wants to use leave. Therefore, you will enter the approved leave on the original LOA **up to** the date of the holiday, and then do a PA30 to enter the holiday and another PA30 to enter the remaining leave dates to total 160 hours.

NOTE: If an employee is eligible for differential pay, you must coordinate with your Agency's Accounts Payable office to ensure that the employee is paid appropriately.

Three LOA Actions must be completed for this exercise. In your work environment, you must process each LOA via ZPAA076:

- A. LOA #1 – Military (Leave)
- B. LOA #2 – Military (30 Days)
- C. LOA #3 – Military (Reserve Active Duty)


For this exercise only and only in training, you will by-pass Workflow. **Caution! You will never by-pass Workflow for this type of Action in your work environment.**

A. LOA #1 – Military (Leave)



Part I (of A) – Initiate Military (Leave)

NOTE:

- You will receive a warning message on each infotype indicating that the previous record will be delimited. Press Enter to accept the message.
- When the class is taught from June – December (after the May payroll run), you will get a message that it is in a past payroll period. Press Enter to accept the message.

1. On the Easy Access screen, type **PA40** in the Command field (**Caution! In your work environment, you will use ZPAA076 for Workflow**).
2. Click . The Personnel Actions screen is displayed.
3. Enter the following data:

Infotype/Field	Value
Personnel no.	Use the employee assigned to you on the Data Sheet.
From	05/05/2008
Action Type	Leave of Absence

4. Click Enter .
5. Click Execute .
6. Complete the following fields:

Infotype/Field	Value
Actions (0000)	
Reason for Action	Reserve Active Duty (Leave). NOTE: In your work environment, this field will default WF.
Organizational Assignment (0001)	Save
Monitoring of Tasks	To view a list of your tasks, run the <i>Date Monitoring Report</i> (transaction S_PHO_48000450).
Task Type	Estimated Leave Run Out
Date of Task	Date: <enter appropriate date>. Use the calendar icon to select the date that will indicate when the 160 hours of leave will be used. Don't forget the start date in this exercise is May 5, 2008.
Comments	Use Edit > Maintain text and enter the following text: "Ends the 160 hours leave that employee requested to be used. Enter a new LOA for 30 days the State will pay."
Reminder Date	Press Enter. When you press Enter, the reminder date field automatically populates. Change if applicable.
Delimit Objects on loan (0040)	Click Next Record icon In your work environment, follow your Agency's policy regarding whether or not employees return items while out on leave. If the employees should return the items, then you would delimit the infotype.

Substitutions (2003)	<p>From: The date of the Action</p> <p>To: 12/31/9999</p> <p>Substitution type: LOA Military</p> <p>Daily Work Schedule: Leave blank</p> <p>Work schedule rule: D01N08GN (for this scenario). You will always enter either a 40-day work schedule for a full-time employee, or a 20-day work schedule for a part-time employee.</p> <p>NOTE: If you enter the Holiday Calendar ID before you enter the work schedule rule, the list of rules will be limited to only those that apply to the Holiday Calendar; otherwise, all of the work rules display.</p> <p>Holiday Calendar ID: Will automatically populate when you enter the Work schedule rule and press Enter.</p>
Subtypes for infotype Absences pop-up	Select Approved Leave (because employee is using both vacation and bonus)
Absences (2001)	
Dates	<p>Date: Start <enter date of Action></p> <p>To: <enter appropriate date>. Use the calendar icon to select the date up to the May 26th Memorial holiday.</p> <p>When you save the dates, you will receive a collision of time.</p>
Collision of time	<p>Click Red X.</p> <p>Important! When the Create Absences infotype re-displays, be sure to check that the number of hours calculated match the number of hours the employee intends to take. In this scenario, it should be 120 hours at this point (which tells you that he employee is owed another 40).</p> <p>Click Save. The Collision of Times displays again. Click the Green Check.</p>
Subtypes for infotype Time Quota Pop-up	Skip for this scenario because the employee cannot use leave and receive a lump sum payout too.

- You are returned to the Personnel Actions screen. **Important!** In your work environment (because you went through WF) you will click the Back button at the Personnel Actions screen and then click the **Complete Work Item** button to explicitly complete the work flow.

PA30 Absences 2001 infotype	Create Subtype 9300 – Holiday. Enter dates for the Memorial Holiday, 5/26/2008 to 5/26/2008. The total hours should calculate to 8 hours.
PA30 Absences 2001 infotype	<p>Create Subtype 9000 – Approved Leave. Enter the remaining dates it will take to complete the 160 hours that the employee wants to use (in this case, you have already entered 120, so you only need to enter dates for 40 hours)</p> <p>Write down the end date that was calculated because the day after this date is the effective date of your next LOA Action.</p>
PA30 Monitoring of Task 0019 infotype	<p>Create Task Type: Estimated Return Date</p> <p>Date: Enter the date the orders indicate the employee will be finished with military duty (18 months).</p> <p>Enter a note that indicates the employee’s order for 18 months ends.</p>
PA30 Absences 2001 infotype	To see an overview of the Absences that you have entered, make sure the subtype field is blank, click the “All” time period, and the Overview button. The list should display the two leaves and one holiday. You can ensure that you have accurately entered the leave dates to total 160 hours.


A .-- LOA #1 – Military (Leave) is complete

B. LOA #2 – Military (30 days)



You must now enter the second LOA Action for Kumar Reinaldo for the 30 days which he will be paid by the State.

For this exercise only and only for training, you will by-pass Workflow. **Caution! You will never by-pass Workflow for this type of Action in your work environment.**

Part I (of B) – Initiate Military (30 days) PCR as Initiator

1. On the Easy Access screen, type **PA40** in the Command field (**Caution! In your work environment, you will use ZPAA076 for Workflow**).
2. Click . The Personnel Actions screen is displayed.
3. Enter the following data:

Infotype/Field	Value
Personnel no.	Use the employee assigned to you on the Data Sheet.
From	One day after the end date of the last LOA
Action Type	Leave of Absence

8. Click Enter .
9. Click Execute .
10. Complete the following fields:

Infotype/Field	Value
Actions (0000)	
Reason for Action	Reserve Active Duty (30 days). NOTE: In your work environment, this field will default WF.
Organizational Assignment (0001)	Save
Monitoring of Tasks	To view a list of your tasks, run the <i>Date Monitoring Report</i> (transaction S_PHO_48000450).
Task Type	30 days
Date of Task	Date: <enter appropriate date>. Use the calendar icon to select the date that indicates the end of the 30 days being paid by the State.
Comments	Use Edit > Maintain text and write: “Ends 30 days paid by State. A new LOA needs to be created for Active Duty Regular”

Infotype/Field	Value
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.
Delimit Objects on loan (0040)	Click Next Record icon In your work environment, follow your Agency's policy regarding whether or not employees return items while out on leave. If the employees should return the items, then you would delimit the infotype.
Substitutions (2003)	Save (this should already be populated because you created a Substitution in the first LOA).
Subtypes for infotype Absences pop-up	Select Military Active Duty.
Absences (2001)	Start date: The same date as the date of the Action To date: 30 calendar days from the date of the Action Write down the end date because the day <u>after</u> this date is the effective date of your next LOA Action.
Collision of time	Click Red X . Important! When the Create Absences infotype re-displays, be sure to check that the number of hours calculated match the 30 days the State is paying for military leave. Click Save. The Collision of Times displays again. Click the Green Check .
Subtypes for infotype Time Quota Pop-up	Select the icon to close the pop-up.

11. You are returned to the Personnel Actions screen. **Important!** In your work environment (because you went through WF) you will click the Back button at the Personnel Actions screen and then click the **Complete Work Item** button to explicitly complete the work flow.

B.-- LOA #2 – Military (30 days) is complete.

C. LOA #3 – Military (Reserve Active Duty)

You must now enter the third LOA Action for Kumar Reinaldo for the remaining time that he will be away on leave.

For this exercise only and only for training, you will by-pass Workflow. **Caution! You will never by-pass Workflow for this type of Action in your work environment.**

Part I (of C) – Initiate PCR for Military Reserve Active Duty

To complete Part I (of C), use the information you learned from the previous military LOAs to:

- Create new LOA
 - Start date is one day after the end date of the second LOA
 - Action: LOA
 - Reason: Reserve Active Duty
- Process each infotype as applicable:
 - Monitoring of Tasks date: 30 days with a comment that indicates that you are checking the status of the employee
 - Substitutions should have defaulted from your previous entry so you do not need to make any changes.
- You are returned to the Personnel Actions screen. **Important!** In your work environment (because you went through WF) you will click the Back button at the Personnel Actions screen and then click the **Complete Work Item** button to explicitly complete the work flow.

C. -- LOA #3 – Military (Reserve Active Duty) is complete.



Questions

Answer the following questions.

Question 1

True or False: If an employee is a permanent full-time (40 hours a week) employee, D01N08GN code is appropriate to use in the work schedule rule on the Create Substitutions infotype?

A.

Question 2

True or False: You should never receive a *Collision of Time* infotype if you have properly entered a Substitution work schedule for an employee who is out on LOA and is using leave.

A.

Question 3

What step must be taken to ensure that an employee who is eligible for differential pay and is going out on Military LOA receives his or her differential pay?

A.

Question 4

In BEACON, you may have to enter two or more Actions to indicate that an employee is on LOA. Why is this an advantage over the PMIS process where only one Action was needed?

A.

Question 5

How do you ensure that the employee will be paid the State paid 30 days military leave?

A. .

This exercise is complete.

2.4 - Exercise: Reinstatement

Scenario

Patricia Calloway (the same employee in 2.2 - Exercise) has fully recovered and is released to return to work. Assume today is six months since the effective date of her initial LOA. Reinstatement Patricia from LOA. You can refer back to the date you entered on his Monitoring of Tasks as the estimated return date to use as the effective date for this Action.

Part I – Initiate PCR as Initiator

To complete Part I, use the information you learned from previous exercises to:

- Access ZPAA076 and enter the applicable data to process the PCR:
 - Date: six months from the original LOA
 - Action: LOA
 - Reason: Return from WC complete
- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There is one approval level:

- Agency

Part III – Process Approved PCR from Initiator's Inbox

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR
- Enter the applicable data on Personnel Actions screen
- Process each infotype as applicable
 - You will delimit Substitutions
- Explicitly complete Workflow item



Course Title: *Advanced Create and Maintain*

Employee Data

Functional Area: *Human Resources*

Sub Area: *Personnel Administration*

Questions

Answer the following questions.

Question 1

When you Reinstall an employee that has been out on leave, why did you have to delimit substitutions?

A.

This exercise is complete.

3.1 – Work Against


Scenario

You are going to transfer Ronald Cyr from an Educational Developmental Consultant to work against an Environmental Specialist position.



You will only create the Workflow for a Transfer Work Against. In this exercise, you will not process the approved PCR; however, you would process the approved PCR in your work environment.

Initiate Workflow (WF) for Transfer indicating Work Against




Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.



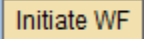

1. On the Easy Access screen, type **ZPAA076** in the Command field.
2. Click . The Employee Action Request screen is displayed.
3. Enter the following data:

Field	Value
Personnel number	Use the Data Sheet Ronald Cyr personnel number that is assigned to your student number.
Effective on	Today's date
Action Type	Transfer
Reason	Within Agency - Lateral

4. Click Enter .
5. Click Create . The second screen of the Employee Action Request screen is displayed.
6. Enter the following data:

Field	Value
Annual Salary	Same as current salary (hint: look in Current column)

7. Click Enter .
8. Click Save . The Information pop-up is displayed with the assigned PCR number.
9. Write the PCR number on the employee paperwork (in class, use your Exercise Guide).
10. Click  to close the pop-up.

11. Click Services for Object . **NOTE:** The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
12. Select Create > Create Note.
13. Enter the following note title: W/A Environmental Specialist.
14. Click in the note section. After you enter your name and date, enter the following note: Employee is working as an Educational Developmental Consultant against an Environmental Specialist position.
15. Click the green check  to close the notes. If applicable, close the notes icon menu.
16. Click . The Information pop-up is displayed indicating that the PCR has been submitted.
17. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).
18. In your work environment, you would then process the Transfer PCR after it has gone through the approval process and is back in your Inbox. In training, you will not process the approved PCR. When the PCR is received at BEST, the position will be changed to indicate the Environmental Specialist position is W/A Environmental Specialist.

Questions

Answer the following questions.

Question 1

True or False: You are going to hire a trainee who will work in an Engineer I position until the trainee completes the training progression. After successfully completing the training progression, the trainee becomes a permanent employee. In this scenario, you would use Work Against Workflow to create a W/A position for the trainee.

A.

Question 2

True or False: Work Against can be used in the following scenario: You are going to hire three permanent employees to work against one position. The position reports to the same supervisor that two of the employees report to. However, the third employee reports to a different supervisor.

A.



Course Title: *Advanced Create and Maintain*

Employee Data

Functional Area: *Human Resources*

Sub Area: *Personnel Administration*

Question 3

Describe the appropriate steps to take in the following scenario: You are going to have an employee work against a position. The position does not report to the same supervisor as the employee.

A.

This exercise is complete.

Discussion: Reallocation

You will not perform an exercise for Reallocation. The instructor will walk through the steps with you. Think back to *PA310 – Create and Maintain Employee Data*. The steps for Reallocation are very similar to the ones you performed in the Range Revision, with the obvious difference of the Action and reasons. In Reallocation, Best Shared Services must make changes to the *position* before you can do the Reallocation Action (in PA310 Range Revision, Best Shared Services made changes to the *job classification* prior to the PA Action).

Scenario

Carol Adams holds a Wildlife/Fisheries Tech I position. The position has been reallocated to a Wildlife/Fisheries Tech II. Her current salary is \$33k. She is approved for an increase to \$36,300 (a 10% increase), but funds are only available for 5% (\$34,650) at this time. Create the applicable Actions and transactions to indicate that Carol has the Reallocation and new salary, and also that the extra \$1,650 are reserved.

Instructions

Use the Business Process Procedure (BPP) to complete the exercise scenario.


Reallocation Action

There are several Actions and transactions needed to complete this scenario. First, if no funds are available, you must make an entry on the employee's record that a Reallocation was authorized, but no funds were available. Then you must put the balance of the funds in reserve. This step is necessary in case the funds are eventually released, and the employee is entitled to some or all of the reserve funds.

Enter Reallocation on the employee's record

1. Verify employee's current salary (PA20, Basic Pay Infotype (0008)). In this scenario, the salary is \$33,000.
2. Initiate transaction code **ZPAA076**
 - Action type: Reallocation
 - Reason: Real Inc - Partial

Personnel Actions:

1. When PCR is approved, execute from your Inbox to access the Personnel Actions screen.
2. Enter the date (the same as the PCR).
3. Select **Reallocation**.
4. Click .
5. Save infotypes as applicable.
6. On the *Create Basic Pay* infotype (IT0008), enter **reason code ZA (Reallocation)**.

Reserve the balance in the employee's wage maintenance infotype

You must now put the remaining money on reserve by modifying the employee's Wage Maintenance infotype. Use the **create** function to enter the data. The effective date is the same as the Reallocation. Observe when you access the Wage Maintenance infotype, there are several blank fields. Those do not require data entry, and they are not supposed to default from any previous entry.

1. From the Easy Access screen, enter **PA30** in the Command field
2. Enter the employees' personnel number (be sure you use the same one you used in the first part of the exercise).
3. Enter **Infotype 0052** (Wage Maintenance) and **subtype 0200** (Future Adjustment Reallocation).
4. Click **Enter** to validate.
5. Click the **Create** icon.
6. Type **today's** date in the **Start Date** field.
7. Type the **amount being reserved** in the **Amount** field (for this example, enter \$1,650.00).
8. **Enter** and **Save**.

Questions

Answer the following questions.

Question 1

If you executed a Reallocation and no funds were available, what Action and additional step would you use to increase the salary when funds do become available?

A.

Question 2

What must take place prior to initiating ZPAA076-Workflow approval for a Reallocation?

A.

This exercise is complete.